

Community Based Outlet Program (CBOP) USER MANUAL

November 2002

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1.0 PROCESS SUMMARY OVERVIEW

The Community Based Outlet Program (CBOP) provides distribution of approximately 20,000 orders to approximately 7,000 community outlet partners in almost 18,000 locations. The CBOP program serves outlets such as newspapers, grocery stores, office supply stores, and copy centers. CBOP is closely related to the “corporate” program, a subsystem of BPOL.

The CBOP application stores all the address and order information for the entities identified under the CBOP program. They are Corporations, Credit Unions, Grocery Stores, Newspapers, City/County Governments and Copy Centers. Approximately 19,000 alternate community outlet locations provide tax forms, instructions, and information. The CBOP application uses the data to create mailing labels, mailing lists for print vendors and inkjet equipment in the ADCs, and to generate reports using CBOPREP. Users can perform a variety of queries upon the data stored in CBOP. For example, one useful way to sort the data is to examine which products are ordered at each address.

The customer’s name, address and product order data are entered into the CBOP database in the EA (External Address) tables. In August, address files are pulled and sent to a contractor to send out recruitment letters. As products become available, the appropriate address information is sent to the print vendor for order fulfillment. After this occurs, all subsequent requests for the product are filled via CIDS at the ADCs.

2.0 SECURITY

Any CAPS user with a valid User ID can use the CBOP application to make inquiries about products, shipping addresses, etc. Access to creating new accounts and to placing or modifying orders is limited. Users who wish to gain access to these capabilities must have their supervisor submit a written request to the Application Owner.

3.0 EXTERNAL ADDRESS SYSTEM MAIN MENU SCREEN

The Community Based Outlet Program (CBOP) is a subsystem of the External Address System. To access CBOP, you must first access the EA application. You do this by typing EAPROD from any blank screen within the Computer Assisted Publishing System (CAPS). That will bring you to the External Address System Main Menu Screen, shown below.

Press PF3 to exit the External Address System, return to a blank CAPS screen and initiate another CAPS application.

EXM01

External Address System
Main Menu

Program	Description
BP	BANKS, POST OFFICES AND LIBRARIES
CBOP	COMMUNITY BASE OUTLET PROGRAM
CI	CRIMINAL INVESTIGATION
EM	EMBASSY
SB	SMALL BUSINESS
ST	SCHOOL TRAINING
TP	TAX PRACTITIONER
USDA	U.S. DEPARTMENT OF AGRICULTURE

Selection: CBOP

3.1 CBOP MAIN MENU

Entering CBOP at the External Address Systems Main Menu will bring you to the Community Base Outlet Program (CBOP) Main Menu.

Functions 1 through 4 require you to know the customer's account number before you can select them. Function #7 enables you to perform a search for a customer's account number.

Not all users have the ability to add new accounts (Function #5). This is dependent upon the level of a user's security access.

Function #6 allows you to search the products before you enter an order for a customer, to look up the available item numbers and names.

Press PF3 to return to the External Address Systems Main Menu.

```
EA00M01      COMMUNITY BASE OUTLET PROGRAM
              External Address System
-----
              Enter Function ====> ____
Enter Customer Account Number ====> _____

+-----+
| Functions ====> 1  CUSTOMER ADDRESS          |
|                  2  CUSTOMER ORDER ENTRY     |
|                  3  CUSTOMER REORDERS         |
|                  4  SEARCH RE-ORDERS          |
|                  5  ADD NEW ACCOUNT           |
|                  6  PRODUCTS TABLE           |
|                  7  SEARCHES                  |
+-----+
```

3.1.1 CUSTOMER ADDRESS

Selecting Function #1 and entering a customer account number at the CBOP Main Menu Screen will bring you to the CBOP Address Information Screen, shown below.

If you make any additions or revisions to a customer's address file, you must press PF6 to SAVE the changes to the database. Otherwise the changes will be lost when you exit.

Press PF4 to view the customer's order history or to add or modify orders for this customer. This option is the same as choosing Function #2 from the CBOP Main Menu Screen.

Press PF10 if you want to search for another customer. This tool is the same as if you were to select Function #7 from the CBOP Main Menu Screen.

Press PF3 to return to the CBOP Main Menu.

```
EA10S01      COMMUNITY BASE OUTLET PROGRAM
              Address Information Screen
-----
Address Information:
  Account: 100490   Type: Q   Survey Type:      Survey Date:
  Organization: ALMIGHTY PRINTING INC
  Apt/Suite/Attn: _____
  Address: 3275 ADAMS AVE
  City: SAN DIEGO   State: CA Zip: 92116 - 1683 - 00
  Country Name: _____ Foreign Country Code: _____
  Foreign Zip: _____
  Response Date: 2001-06-02   Status Code: ____
  Center:      Region:      District:      SIC: _____

Contact Information:
  First Name: _____ Last Name: _____
  Phone Number: ( 000 ) 000 - 0000

Other Information:
  Employees: _____ Branches: _____ Loading Dock: ____ Air Code: ____
  Entry Date: 2001-06-02   Last Updated: 2001-06-02   Last Update Id:
-----CAPS
ENTER=ACCOUNT, PF1=HELP, PF3=EXIT, PF4=ORDERS, PF6=UPDATE, PF10=SEARCH
```

3.1.2 CUSTOMER ORDER ENTRY

Select Function #2 from the CBOP Main Menu Screen to view a customer's order history, or to create a new order for the customer or modify a current order. You must have the customer's account number in order to access this screen from the Main Menu.

If the list of customer orders is longer than one screen, you will see the word MORE at the bottom of the screen. Pressing PF8 will take you to the next screen of information. Use PF7 to go to the prior screen of information. When you have reached the last screen, the words NO MORE will appear at the bottom of the screen.

If you add an order, or change an existing order, you must press PF6 to confirm your modifications or they will not be saved in the database. To add a new order, you must put an "A" in the Add/Chg field next to the catalog number and the other relevant information. To change an existing order, type a "C" in the Add/Chg field. To obtain more information about an existing order, type "M" in the Add/Chg field.

Pressing PF4 will take you to the customer's Address Information Screen, which is the same as if you had gone back to the Main Menu and selected Function #1.

Press PF3 to return to the CBOP Main Menu Screen.

```
EA20S01                                COMMUNITY BASE OUTLET PROGRAM
                                     Order Information Screen
```

```
Account: 100490   X    Organization: ALMIGHTY PRINTING INC
                                   Type: Q
```

Add/ Chg	Catnum	Chk Ltr	Pre	Form Name	Order Qty	Ship Qty	Shipped Date	Cids Generate	Order	Cids Flag
-	20497	L	P	1796 CD ROM	1	1	2000-01-08			
-										
-										
-										
-										
-										
-										
-										
-										
-										
-										
-										
-										
-										
-										
-										
-										
-										

```
NO MORE
```

```
--CAPS
PF3=Exit PF4=Addr PF6=Confirm PF7=Back PF8=Forw A=Add C=Chq D=Del M=More
```


3.1.2.1 ADDITIONAL ORDER INFORMATION

Entering an M in the Add/Chg field next to an item on the Order Information Screen will provide more information about that item order, on the Additional Order Information Screen, shown below.

Press PF3 to return to the CBOP Order Information Screen.

```
EA22S01      COMMUNITY BASE OUTLET PROGRAM
              Additional Order Information Screen
-----
Account: 100490 _   Firm / Company: ALMIGHTY PRINTING INC
Catnum: 20497  L  Item: P1796 CD ROM
      Quantity Ordered: 1   Order Date: 2000-10-31   Order Time: 12.44.39
      Quantity Shipped: 1   Ship Date: 2000-01-08
Original Order Qty: 1
      Cids Quantity:          Cids Date:                  Cids Order Gen:               
      Cids Flag: _
Contractor Quantity: 1   Cont Date: 2000-01-08
      Last Update Date: 2000-10-31   Last Update Id: CWOLFF
-----CAPS
      PF1=HELP PF3=Return
```

3.1.3 CUSTOMER RE-ORDERS

To re-order forms for a customer, or to change a recently-placed re-order, select Function #3 from the CBOP Main Menu. You will need to know the customer's Account number. This will bring you to the CBOP Re-Order Information Screen, shown below. If you are adding a new re-order, type an A in the Add/Chg field. If you are changing an order that was recently entered, type a C in the Add/Chg field.

If you do not know the Catalog number or the form name of the product you are ordering, press PF10 to view the Products File and to select the correct item. This performs the same function as selecting Function #6 from the CBOP Main Menu Screen.

If a large number of orders have been placed, more than will fit on one screen, you may use PF8 to scroll to the next screen. Press PF7 to scroll back to the previous screen.

Press PF3 to return to the CBOP Main Menu.

```
EA32S01      COMMUNITY BASE OUTLET PROGRAM
              * 2000 * Re-Order Information
Account Number: 100490 X   Name: ALMIGHTY PRINTING INC           Type: Q
Street:
City: SAN DIEGO           State: CA   Zip: 92116 - 1683
Processing Date: 2001-07-03   Processing Time: 11:33:09   Pages:
                                R
                                OF
Add Catnum C Pre-   Form      Qty Bef. E   Qty   Qty   Shipped   C
Chg          L Fix   Name      Sug.  P   Ordered Shipped Date   F
-   -   -   -   -   -   -   -   -   -   -   -
-   -   -   -   -   -   -   -   -   -   -
-   -   -   -   -   -   -   -   -   -   -
-   -   -   -   -   -   -   -   -   -   -
-   -   -   -   -   -   -   -   -   -   -
-   -   -   -   -   -   -   -   -   -   -
-   -   -   -   -   -   -   -   -   -   -
-   -   -   -   -   -   -   -   -   -   -
-   -   -   -   -   -   -   -   -   -   -
-   -   -   -   -   -   -   -   -   -   -
```

NO MORE

A=Add, C=Change, PF3=End, PF7=Up, PF8=Down, PF10=Form Menu

3.1.4 SEARCH RE-ORDERS

To view the re-order history for a customer account, select Function # 4 from the CBOP Main Menu screen.

If there are no re-orders for that account, you will not be able to progress past the Main Menu Screen. It is rare for accounts to have re-orders entered, as it is often faster to create a new order.

If you are working from a CAPS keyboard with an extended set of Function (PF) keys, press PF14 to review last year's orders.

If the number of re-orders extends beyond the length of one screen, press PF8 to scroll forward to the next page. Use PF7 to scroll back to the prior screen.

Use PF4 to review the Customer Account Address screen.

Press PF3 to return to the CBOP Main Menu screen.

```
EA30M001      COMMUNITY BASE OUTLET PROGRAM
                        Re-Order Information
Account Number: 100058   Q           Type: V
Name: DOVE                                     Address: 1111 CONSTITUTION AVE
Street: ROOM 6038
City: WASHINGTON          State: DC   Zip: 20224 -
Contact:                  Phone:( 202 ) 555 - 1212 Ext.:
Response Flag(Remove Account): 1
                |-----Processing-----|       Operator             Pages:
Review         Date        Time        Ident.              OF
    -            2001-11-07  14.34.20     MIKE
    -
    -
    -
    -
    -
    -
    -
    -
    -
    -
                                NO MORE
PF3=End, PF4=Address, PF5=Write-Ins, PF7=Up, PF8=Down, PF14>Last Years Orders
```

3.1.5 ADD NEW ACCOUNT

In order to add a new customer account, you must select Function #5 from the CBOP Main Menu screen.

Not all users have the correct level of security access to add a new account. If you do not have this level of access and you attempt to select Function #5 from the CBOP Main Menu, you will receive an error message that reads, "Account Cannot Add New Customers".

If you believe that you have received this message in error, and that you should have a level of access sufficient to be able to add or modify accounts, you must contact the Application Owner. In most cases, a written request from your supervisor to the Application Owner, describing the reason for your need to access the higher level of security is usually sufficient.

Press PF3 to exit this screen and return to the CBOP Main Menu screen.

```
EA10S01      COMMUNITY BASE OUTLET PROGRAM
              Add Address Information Screen
-----
Address Information:
  Account: _____ Type: _ Survey Type: _____ Survey Date: _____
  Organization: _____
  Apt/Suite/Attn: _____
  Address: _____
  City: _____ State: __ Zip: _____ - _____ - ____
  Country Name: _____ Foreign Country Code: ____
  Foreign Zip: _____
  Comment: _____
  Response Date: _____ Status Code: _
  Center: _____ Region: _____ District: _____ SIC: _____
Contact Information:
  First Name: _____ MI: _ Last Name: _____
  Phone Number:( ____ ) ____ - ____ Fax Number:( ____ ) ____ - ____
  E-Mail: _____
Other Information:
  Employees: _____ Branches: _____ Loading Dock: _ Air Code: ____
  Entry Date: _____ Last Updated: _____ Last Update Id: _____
-----CAPS
PF1=HELP, PF2=Add, PF3=Exit
```

3.1.6 PRODUCTS FILE

Select Function #6 from the CBOP Main Menu when you need to view the CBOP Products File. You would use this option when you need to order a product but you do not know its correct Catalog Number or Form Name. The Products File option is available to help you search for the item you wish to order.

Press PF3 to return to the CBOP Main Menu.

[illegible]

NO MORE

-CAPS--

PF3=End, A=Add, C=Change, D=Delete, Enter=Search

3.1.7 SEARCHES

If you do not know the account number of the customer whose order you are filling or modifying, select Function #7, Searches, at the CBOP Main Menu. This will bring you to the Search Information Screen, shown below.

Using the function keys (PF_), you can search the CBOP address database using several different parameters. One method is to search by Country of residence (PF5); simply leave the search space blank and press the function key. Another is to search by Telephone number (PF10). A third option is to search by the customer's ZIP code (PF11). Using the customer's Last name as a search parameter is also an option (PF12).

The most commonly used parameter for searching the address database is the customer Account number (PF9). Leaving the Search line blank, simply press PF9 and the entire list of Account numbers will appear on the screen. Press PF8 to scroll forward to the next page; press PF7 to scroll back to a previous page.

When you have found the account for which you are looking, type an X in the field to the left of the Account number. This will bring you to the account Address Information Screen, which is the equivalent of having exited this Function and selected Function #1 from the CBOP Main Menu.

Press PF3 to return to the CBOP Main Menu.

EA80S01

COMMUNITY BASE OUTLET PROGRAM

Search: Search Information Screen

X

Account

Last-Name

First-Name

Company-Name

—

—

—

—

—

—

—

—

—

—

—

—

—

—

—

-----CAPS

PF3=Exit PF5=Cntry PF7=Back PF8=Forward PF9=Acct PF10=Phone PF11=Zip PF12=Last